

CVRI Grants Management System

-

Introduction - 3 main components

- **Pre Award**
 - **Post Award**
 - **Personnel**
- Together they are easy to use, customizable, flexible tracking and reporting system for grants management. The goal of the system is to simplify the grant process from start to finish.

What are the benefits?

- **Easy to Use**
- **Flexible & Powerful Reports**
- **Seamless Integration of Central Administration Data (GL, EDB)**
- **Cross platform**

PreAward

- **Finding Funding**
- **Building a budget, other support and other forms from online data**
- **Track applications and funding**

Funding Database

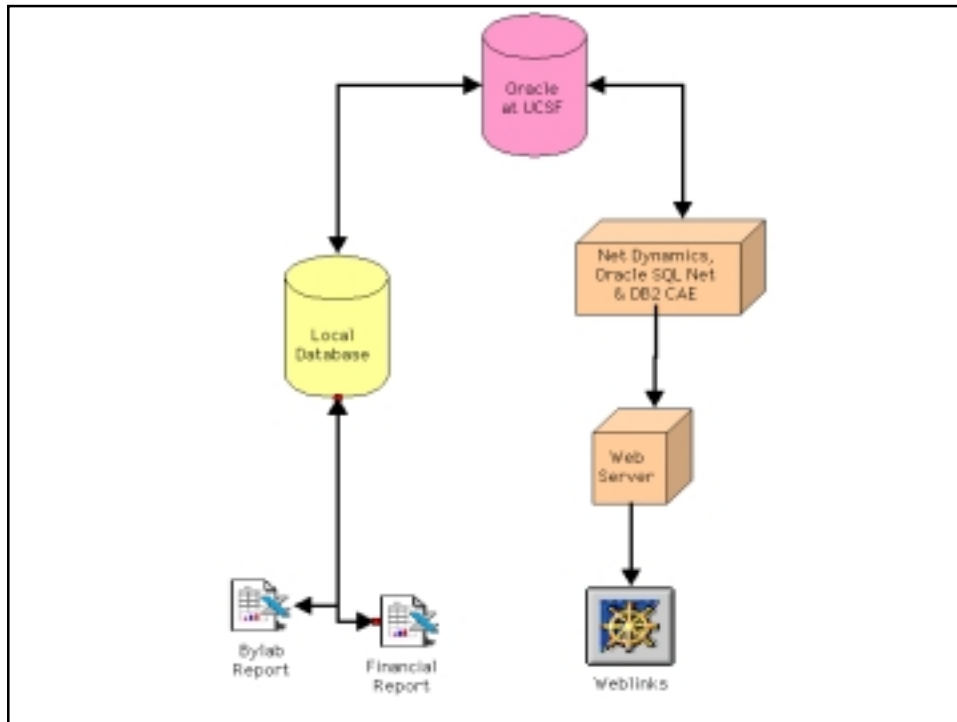
- Finding funding
- Notify investigators of available funding
- Maintaining up to date information
- The most important aspect of getting funded is knowing what is available to you. By automating funding information your investigators stay well informed and keep yourself and your files current.

Building a Budget, Other support and other related forms

- Build an NIH style budget
- Data from Central Administration
- Build Other support pages
- Automating the various components such as salary lookup, other support, staff funding levels, etc., from online databases, forms can be generated quickly and accurately with more time for analysis.

Track applications and funding

- Build Other Support Pages
- Generate Reports on funding status
- Know when continuations or renewals are due
- Allows efficient management of Other support information, instant reporting on Department or Investigator's funding status.








Post Award Process Logs & Reconciliation

- **Purchase Order Logs**
 - departmental housekeeping
- **P.O. Reconciliation**
 - Oracle download
validation (GL versus Dept)

Purchase Order Log

POList_FP3

List New PO# Search Print Sort

SpeedKey 12875

Ref	OrderDate	Vendor	Invoice #	Revenue	Expenses	Amount	Received			Reconcile		Ordered			
							✓	By	Date	By	Date	GLDate	By	Date	
▼ D	11/8/99											sfcvrhg	11/8/99		
▼ D	11/8/99											sfcvrhg	11/8/99		
▼ D	0100	7/2/99	UCSF Library		\$15.00	-\$15.00							7/2/99		
			copycard, 1x200 copies, for DM												
▼ D	0101	7/6/99	Amersham		\$201.47	-\$201.47	X	sfcvrh	10/18/99					7/6/99	
			RPN1604, megaprime DNA labelling system @\$182.00/kitx1+15.47tx+4.00oc, eta070799, sr851854												
▼ D	0102	6/7/99	IRSS	9903792	\$17.60	-\$17.60	X	sfcvrh	10/18/99	sfcvrcs	1/14/00	6/30/99	sfcvrhg	6/7/99	
			slide film development (2 C36M) for KF, sr9903792												
▼ D	0103	8/25/99			\$15,000.00		\$15,000.00	X	sfcvrh	10/15/99		8/25/99		sfcvrhg	8/25/99
			nonpayroll												
▼ A	0103	6/9/99	IRSS		\$8.80	-\$8.80	X	sfcvrh	10/18/99	sfcvrcs	1/14/00	6/30/99	sfcvrhg	6/9/99	
			slide film development (1 C36M) for KF												
▼ D	0104												sfcvrhg		
▼ D	0105	10/21/99											sfcvrhg	10/21/99	
▼ D	0106	10/28/99											sfcvrhg	10/28/99	

P.O. Reconciliation

Preview DPA No: 4443E7 Step 1 Step 2 Step 3
Print Fund No: 33533 Reconcile
Fund Yr: Reconcile

Journal Ledger for 444967-33583 for Fiscal Year 2000 Accounting Per

Period	Source	NCA No	PGM Cd	Journal Line Description	Budget Amt	Financial Amt	Lein Amt	X	PO ID	Invoice ID
7	536	41233J		JAN PAYROLL	\$0.00	\$31.44	\$0.00			
7	536	41234J		JAN PAYROLL	\$0.00	\$30.93	\$0.00			
7	536	41238J		JAN PAYROLL	\$0.00	\$2.03	\$0.00			
7	426	43601J		SANTACRUZ BIOTECHN 00587644	\$0.00	\$74.25	\$0.00		12875D0172	4108E63

Go By PL: received Recorder: 0172 GLDate: U

Post Award Process - Final Reports

- Outline grant parameters
- Create Budget & outstanding costs
- Create payroll projections
- Export report to Excel-Run macro
- Customize Report
- Print

Budget Builder

Name of Budget

CVRI-DEMO

Account	Fund	Fund Yr	Indirect Cost Rate	Starting Period	Ending Period	Report Month	Scenario
444967	31495		47.50%	12/1/1999	11/30/2002	1/31/2000	Actual

2 Add the Budget for the project.



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Budget		Budget	Lein
Month	NCA Group Name	Amount	Amount
12/1/1999	ACADEMIC SALARIES - EXC TIME	\$101,719.00	
12/1/1999	ACADEMIC BENEFITS	\$18,538.00	
12/1/1999	ACADEMIC SALARIES - EXC TIME	\$10,000.00	
12/1/1999	ACADEMIC SALARIES - POS TIME	\$31,000.00	
12/1/1999	BALANCE SHEET NCA BUDGET GROUP	\$6,650.00	
12/1/1999	BALANCING BUDGET ENTRIES	\$65,743.00	
12/1/1999	BALANCING FINANCIAL ENTRIES	\$1,500.00	
12/1/1999	CAMPUS UNALLOC-BUDGET USE ONLY	\$103,472.00	
12/1/1999	CAPITAL EQUIPMENT	\$18,857.00	
12/1/1999	COMMUNICATIONS	\$10,300.00	
12/1/1999	COMPUTING/DATA PROCESSING	\$1,545.00	
12/1/1999	ACADEMIC BENEFITS	\$6,850.00	
12/1/1999	NON-PAYROLL UNALLOCATED	\$66,986.00	
12/1/1999	TRAVEL		
12/1/1999	OTHER EXPENSES		
12/1/1999	EXPENSE RECOVERY		

Total \$443,160.00

Buttons

Back

Next

Quit

Creation Date 2/24/2000

Browse

Personnel Builder

Name of Budget
CVRI-DEMO

Account	Fund	Fund Yr	Indirect Cost Rate	Starting Period	Ending Period	Report Month	Scenario
444967	31495		47.50%	12/1/1999	11/30/2002	1/31/2000	Actual



3 Add personnel to the projection list below by clicking the icons to the left of each row.

Name	Title	Monthly Base	Hr	Merit Date	% Inc	NH Cap	Budget Month	% Salary	Fringe Rate	Total		
										Salary	Fringe	Total
U221/38833		In 12,005.00		1/1/1		X	1/1/2000	35%	.17	\$3,672.08	624.25	\$4,296.33
U20806329 Dodou, Evdokia		In 12,005.00		1/1/1		X	2/1/2000	35%	.17	\$3,672.08	624.25	\$4,296.33
U28400943 Drown, Donna J		In 12,005.00		1/1/1		X	3/1/2000	35%	.17	\$3,672.08	624.25	\$4,296.33
U221/1938 Duchateau, Philippe		In 12,005.00		1/1/1		X	4/1/2000	35%	.17	\$3,672.08	624.25	\$4,296.33
U22210140 Duong, Daniel N.		In 12,005.00		1/1/1		X	5/1/2000	35%	.17	\$3,672.08	624.25	\$4,296.33
U22365/53 Edmondson, Jess M		In 12,005.00		1/1/1		X	6/1/2000	35%	.17	\$3,672.08	624.25	\$4,296.33
U29208315 Eng, Celeste S		In 12,005.00		1/1/1		X	7/1/2000	35%	.17	\$3,672.08	624.25	\$4,296.33
U22385983 Ersey, Robert		In 12,005.00		1/1/1		X	8/1/2000	35%	.17	\$3,672.08	624.25	\$4,296.33
U22389621 Escoto, Lourdes P		In 12,005.00		1/1/1		X	9/1/2000	35%	.17	\$3,672.08	624.25	\$4,296.33
U23/56505 Ezaki, Tachi		In 12,005.00		1/1/1		X	10/1/2000	35%	.17	\$3,672.08	624.25	\$4,296.33
U224365		In 12,005.00		1/1/1		X	11/1/2000	35%	.17	\$3,672.08	624.25	\$4,296.33
U224365		In 12,005.00		1/1/1		X	12/1/2000	35%	.17	\$3,672.08	624.25	\$4,296.33
U224365		In 12,005.00		1/1/1		X	1/1/2001	35%	.17	\$3,672.08	624.25	\$4,296.33
U225112		4,159.00		7/1/95			1/1/2000	20%	.17	\$831.80	141.41	\$973.21
U225112		4,159.00		7/1/95			2/1/2000	20%	.17	\$831.80	141.41	\$973.21
U225112		4,159.00		7/1/95			3/1/2000	20%	.17	\$831.80	141.41	\$973.21
U225112		4,159.00		7/1/95			4/1/2000	20%	.17	\$831.80	141.41	\$973.21
U225112		4,159.00		7/1/95			5/1/2000	20%	.17	\$831.80	141.41	\$973.21

Total Personnel Expense \$69,757.40

Buttons Back Next Quit

Creation Date 2/24/2000

Browse

Employee Salary Report & Projections



CVRI-DEMO
444967- XXXXX

Employee Name; toe_nam	Data	Type	Pay Period	Projected											Grand Total
		Actual	12/1/99	1/1/00	2/1/00	3/1/00	4/1/00	5/1/00	6/1/00	7/1/00	8/1/00	9/1/00	10/1/00	11/1/00	
Bunny, Buggs	% TIME		35.00%	35.00%	35.00%	35.00%	35.00%	35.00%	35.00%	35.00%	35.00%	35.00%	35.00%	35.00%	420.00%
	Salary Amt		\$3,672.08	\$3,672.08	\$3,672.00	\$3,672.00	\$3,672.00	\$3,672.00	\$3,672.00	\$3,672.00	\$3,672.00	\$3,672.00	\$3,672.00	\$3,672.00	\$44,064.16
	Benefits Amt		\$578.99	\$575.47	\$624.25	\$624.25	\$624.25	\$624.25	\$624.25	\$624.25	\$624.25	\$624.25	\$624.25	\$624.25	\$7,396.96
Pig, Porky	% TIME		20.00%	20.00%	20.00%	20.00%	20.00%	20.00%	20.00%	20.00%	20.00%	20.00%	20.00%	20.00%	240.00%
	Salary Amt		\$888.00	\$831.80	\$831.80	\$831.80	\$831.80	\$831.80	\$831.80	\$831.80	\$831.80	\$831.80	\$831.80	\$831.80	\$10,037.80
	Benefits Amt		\$205.44	\$198.28	\$141.40	\$141.40	\$141.40	\$141.40	\$141.40	\$141.40	\$141.40	\$141.40	\$141.40	\$141.40	\$1,817.72
Duck, Daffy	% TIME		25.00%	25.00%	25.00%	25.00%	25.00%	25.00%	25.00%	25.00%	25.00%	25.00%	25.00%	25.00%	175.00%
	Salary Amt		\$1,440.75	\$1,440.75	\$1,440.70	\$1,440.70	\$1,440.70	\$1,440.70	\$1,440.70	\$1,440.70	\$1,440.70	\$1,440.70	\$1,440.70	\$1,440.70	\$10,085.00
	Benefits Amt		\$201.29	\$199.77	\$244.92	\$244.92	\$244.92	\$244.92	\$244.92	\$244.92	\$244.92	\$244.92	\$244.92	\$244.92	\$1,625.66
Duck, Donald	% TIME		5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%	60.00%
	Salary Amt		\$124.05	\$124.05	\$124.05	\$124.05	\$124.05	\$124.05	\$124.05	\$124.05	\$124.05	\$124.05	\$124.05	\$124.05	\$1,488.60
	Benefits Amt		\$70.42	\$69.82	\$28.53	\$28.53	\$28.53	\$28.53	\$28.53	\$28.53	\$28.53	\$28.53	\$28.53	\$28.53	\$425.54
Runner, Road	% TIME			0.00%											0.00%
	Salary Amt			\$882.52											\$882.52
	Benefits Amt			\$93.59											\$93.59
Total % TIME			85.00%	85.00%	85.00%	85.00%	85.00%	85.00%	85.00%	85.00%	60.00%	60.00%	60.00%	60.00%	60.00%
Total Salary Amt			\$6,124.88	\$6,951.20	\$6,068.55	\$6,068.55	\$6,068.55	\$6,068.55	\$6,068.55	\$6,068.55	\$4,627.85	\$4,627.85	\$4,627.85	\$4,627.85	\$66,558.08
Total Benefits Amt			\$1,056.14	\$1,136.93	\$1,039.10	\$1,039.10	\$1,039.10	\$1,039.10	\$1,039.10	\$1,039.10	\$794.18	\$794.18	\$794.18	\$794.18	\$11,359.47

Vacation Liability

Employee Name; toe_nam	Data	Type	Pay Period	Projected											Grand Total
		Actual	2/1/00	3/1/00	4/1/00	5/1/00	6/1/00	7/1/00	8/1/00	9/1/00	10/1/00	11/1/00			
Bunny, Buggs	Vacation Actual		\$0.00												\$0.00
	Vacation Projection		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Pig, Porky	Vacation Actual		\$474.15												\$474.15
	Vacation Projection		\$0.00	\$76.00	\$76.00	\$76.00	\$76.00	\$76.00	\$76.00	\$76.00	\$76.00	\$76.00	\$76.00	\$76.00	\$760.00
Duck, Daffy	Vacation Actual		\$3,623.81												\$3,623.81
	Vacation Projection		\$0.00	\$116.00	\$116.00	\$116.00	\$116.00	\$116.00	\$116.00	\$116.00	\$116.00	\$116.00	\$116.00	\$116.00	\$580.00
Duck, Donald	Vacation Actual		\$17.88												\$17.88
	Vacation Projection		\$0.00	\$7.00	\$7.00	\$7.00	\$7.00	\$7.00	\$7.00	\$7.00	\$7.00	\$7.00	\$7.00	\$7.00	\$70.00
Runner, Road	Vacation Actual		\$189.94												\$189.94
	Vacation Projection		\$0.00												\$0.00
Total Vacation Actual			\$3,623.81												\$3,623.81
Total Vacation Projection			\$0.00	\$199.00	\$199.00	\$199.00	\$199.00	\$199.00	\$199.00	\$83.00	\$83.00	\$83.00	\$83.00	\$83.00	\$1,410.00

Account Status report

Financial Report for Fund 31495



CVRI-DEMO
Fiscal_Year: 1999
DPA_No: 444967
Fund_No: 31495
Account Status as of 2/24/2000

Sum of Reapprop Type 2	Column Type				
Category	GL Budget	GL Financial	PI Lein	GL Lein	Grand Total
ACADEMIC SALARIES	(\$205,191.00)	\$80,894.44	\$52,241.50	\$0.00	(\$72,055.06)
ACADEMIC BENEFITS	(\$37,395.00)	\$11,758.75	\$8,881.10	\$0.00	(\$16,755.15)
NO N-ACADEMIC SALARIES	\$0.00	\$3,523.31	\$1,240.50	\$0.00	\$4,763.81
NO N-ACADEMIC BENEFITS	\$0.00	\$15,278.24	\$285.30	\$0.00	\$15,563.54
NO N-PAYROLL UNALLOCATED	(\$20,300.00)	\$0.00	\$0.00	\$0.00	(\$20,300.00)
OTHER EXPENSES	(\$13,500.00)	\$140.00	\$0.00	\$0.00	(\$13,360.00)
OTHER SERVICES	\$0.00	\$35,159.60	\$0.00	\$0.00	\$35,159.60
OTHER SUPPLIES	\$0.00	\$19,838.91	\$0.00	\$0.00	\$19,838.91
PRINTING, REPRODUCTION & MED	\$0.00	\$1,333.75	\$0.00	\$0.00	\$1,333.75
TRAVEL	(\$3,045.00)	\$2,261.74	\$0.00	\$0.00	(\$783.26)
FREIGHT AND POSTAGE	\$0.00	\$117.55	\$0.00	\$0.00	\$117.55
CAPITAL EQUIPMENT	(\$31,000.00)	\$26,670.78	\$0.00	\$6,705.30	\$2,376.08
COMPUTING/DATA PROCESSING	\$0.00	\$226.86	\$0.00	\$0.00	\$226.86
COMMUNICATIONS	\$0.00	\$852.46	\$0.00	\$0.00	\$852.46
SALARY RELATED (BUDGET USE)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Direct cost Total	(\$310,431.00)	\$198,056.39	\$62,648.40	\$6,705.30	(\$43,020.91)
EXPENSE RECOVERY	(\$132,729.00)	\$81,006.31	\$29,757.99	\$0.00	(\$21,964.70)
EXPENSE RECOVERY Total	(\$132,729.00)	\$81,006.31	\$29,757.99	\$0.00	(\$21,964.70)
Grand Total	(\$443,160.00)	\$279,062.70	\$92,406.39	\$6,705.30	(\$64,985.61)